

OMB BUSINESS PLAN INSTRUCTIONS SPRING 2025



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☑ DIRECTOR'S BUSINESS PLAN CHECKLIST ☑

- □ I am using the **revised** business plan template for FY 2024-25 and FY 2025-26 located on the OMB Business Planning <u>Website</u>. The time frame for this business plan represents the two-year period of October 1, 2024 through September 30, 2026.
- □ I have reviewed how my department supports the goals and objectives in the County strategic plan. (Refer to <u>Strategic Plan Goals and Objectives</u> for a list of goals and objectives).
- □ I have included in the Business Plan the most important issues and initiatives my department needs to address in **FY 2024-25** and **FY 2025-26**. I have also identified issues I anticipate for years beyond FY 2025-26.
- □ I have reviewed my department's Scorecard and Business Plan Report generated in the online Strategic Management System (SMS). I have confirmed that my scorecard's objectives and measures are *relevant and up to date,* and that they align to the Strategic Plan.
- □ I have signed the cover page and forwarded the signed originals to OMB by the due date of **May 7**, **2025**.

BUSINESS PLAN DUE DATE

Directors sign and submit Busine including PDF of Scorecard B	-	May 7, 2025
Chiefs sign business plan and su version to OMB, <u>including PDF</u> <u>Business Plan Report</u>	8	July 15, 2025



I. INTRODUCTION TO BUSINESS PLANS AND SCORECARDS IN MIAMI-DADE COUNTY

Departmental business plans are the foundation for appropriate resource allocation through the annual budget process that funds County activities aligned to the goals and objectives listed in the Miami-Dade County Strategic Plan. A well-written business plan summarizes a department's purpose and mission, communicates its priority initiatives for the current and the next fiscal year, and lists key issues which may impact the department's ability to achieve its desired outcomes.

There are **two parts** to the Business Plan:

- 1. <u>The Business Plan Narrative</u>: The narrative provides a written overview of a department's core mission, issues it is facing, and initiatives it wants to pursue in the coming fiscal year. The narrative is prepared in Microsoft Word, and a template for departments is available on the OMB Business Planning <u>Website</u>.
- 2. <u>The Business Plan Report</u>: This report is generated from the department's scorecard in the County's Strategic Management System (SMS). It shows how a department's scorecard objectives are aligned to the strategic plan, the measures it will track, as well as the performance measure targets for the upcoming fiscal year. Targets should reflect the levels required to achieve the outcomes listed in the Strategic Plan. The business plan report should also show departmental priority initiatives included on the scorecard.

Scorecards are monitored throughout the year by departments to manage the implementation of their business plan. The information presented in the business plan is then reviewed by OMB as an introduction to the annual budget process. As a result, it is critical that departments submit their business plans on time with up-to-date details about their challenges and priorities.



II. KEY STEPS TO BUILDING A BUSINESS PLAN

Business plans should be collaboratively prepared with input from departmental staff, OMB, and the Office of the Mayor. All parties should provide input throughout the process prior to final submission. Below is some guidance for developing business plans.

Departmental Roles and Responsibilities

Departmental leadership should review the goals and objectives of the Miami-Dade County Strategic Plan (<u>Strategic Plan Goals and Objectives</u>) and accordingly lay out the Department's performance objectives, measures, and initiatives for the current and next fiscal year.

Department managers and key operational staff should review how specific activities can align to the County Strategic Plan and share factors that may influence their ability to achieve departmental objectives and to specifically define required actions to achieve their performance goals. Managers should remain involved in the business planning process.

Department staff preparing the plan should seek out OMB involvement and include Business Analysts in the planning process. For FY 2024-25, OMB will review the business plan submitted in December to provide comments and overall guidance.

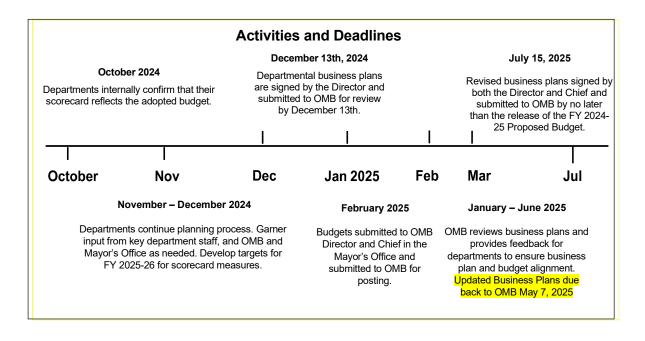


Departmental budget and performance staff should collaborate on an ongoing basis to ensure objectives and performance measures match in the respective SMS and Budget systems.

If you don't know where to start, the <u>Business Plan Development Questions</u> will help departments identify the key elements that should go into a comprehensive business plan. The questions are categorized in the following manner:

- 1. Mission
- 2. Operating Environment
- 4. Employees
- 5. Revenue and Costs
- 3. Customers and Stakeholders
- 6. Processes

III. BUSINESS PLAN TIMELINE





IV. COMPONENTS OF THE BUSINESS PLAN NARRATIVE

The Business Plan Narrative outlines a department's operations and identifies its priority initiatives and key issues for the current and next fiscal year. It should be written in plain language so that it can be shared with employees and stakeholders outside the County. The narrative must be prepared with the latest Microsoft Word template.

The following is a section-by-section explanation of the information that must be included in the Business Plan Narrative. **Please contact your OMB Business Analyst if you have any questions or need any help in completing the template.**

1. <u>Department Overview</u>

- a. <u>Department Vision and Mission</u>: Describe your departmental vision (optional) and mission or purpose statement, which is generally found in the proposed and adopted budget books.
- b. <u>Department Description</u>: Provide an overview of the department's major duties, services, and programs. Also include a brief description of each division. <u>NEW</u>
 <u>FOR SPRING 2025</u>: Incorporate, where applicable, an explanation of the ways in which departmental operations support the <u>Mayor's key deliverables</u>.
- c. <u>Table of Organization</u>: Include the latest functional table of organization from the most recent adopted budget. Please contact your OMB Analyst for a copy of your T.O. from the adopted budget.
- d. <u>Our Customers</u>: Identify departmental customers and their most important needs. If applicable, include major customer trends that can impact operations. Be sure to include **internal** County customers as necessary. Include a description of how customer feedback is obtained, addressed, and measured. Key customer requirements/needs can be translated into performance measures and included on a department scorecard. These performance measures should be indicative of how well a department is meeting or exceeding customer needs.

When evaluating your customers' needs and requirements, consider using the five quality elements (accuracy, cost, timeliness, safety, legal/ethical) to determine which elements are most important to achieving your customers' satisfaction.

e. <u>Strategic Alignment</u>: Identify the Strategic Plan goals and objectives that are directly supported by the department's **most important** activities. It is not necessary to list all goals and objectives that the department may support. The full list of the County Strategic goals and objectives can be found in the <u>Strategic Plan Goals and Objectives</u> document.



f. NEW: Recent Accomplishments

Please include a brief summary of your department's most significant accomplishments for the past fiscal year. These accomplishments should be aligned to priority initiatives in last year's business plan.



2. Key Issues

- a. Insert a summary of significant issues that may impact the implementation of the department business plan (both positively and negatively). Departments are strongly encouraged to perform and include in the business plan a SWOT analysis to help identify such issues.
- b. Include as issues any changes in the business environment, obstacles for major projects, and legislative changes or mandates that impact your operations.
- c. If applicable, include issues that address your department's competitive environment and industry trends.
- d. <u>NEW FOR SPRING 2025</u>: Include issues that are relevant to the <u>Mayor's key</u> <u>deliverables</u>.

3. <u>Priority Initiatives</u>

- a. Priority initiatives are **specific projects that have start and end dates** and are of the greatest importance to your department. Include initiatives that are ongoing or planned in the next fiscal year. Priority initiatives should be limited in number and be directly related to the department's mission and/or customer needs. Sources for priority initiatives include:
 - Initiatives to address the Key Issues identified.



• **NEW FOR SPRING 2025**: High impact priority projects and efforts that have a direct impact on your objectives and budget, especially those strongly aligned with the Strategic Plan and the <u>Mayor's key deliverables</u>.

b. Do not include descriptions of ongoing work or activities.

- c. Consider, wherever possible, placing some timeframes or milestones on these initiatives that demonstrate progress. For example, refer to phases or make statements, such as, "the project will begin this year and end in 2026."
- d. Initiatives listed here should be created, linked to relevant departmental objectives and periodically updated in the County's SMS. However, not all initiatives tracked in SMS need to be listed in this portion of the business plan. See also Section V: The Business Plan Report.



Sample initiatives include:

- Complete Ocean Rescue Facility at Crandon Park
- Implement Greenway Prioritization Plan
- Implement an RER Mobile Inspection System

Below are examples of ongoing activities that should **not** be included in this section:

- Continue teaching Lean Six Sigma classes
- Continue to prepare the Proposed Budget each year

4. Future Outlook

a. Similar to "Key Issues" above, describe significant factors that may impact your operations and your ability to achieve your strategic goals within the next 3-5 years. (Examples include: passing of new state or federal legislation, changes in macroeconomic conditions, predictions for County landfill capacity, etc.)



V. THE BUSINESS PLAN REPORT (DEPARTMENT SCORECARD)

The Business Plan Report is completed by using the County's SMS. This report consists of the departmental scorecard followed by more detailed information on the departmental performance measures and initiatives. Below are detailed steps for preparing and submitting this report. If you have any technical difficulties running this report, please call OMB. See the next section for steps to complete the Business Plan Report.

1. Departmental Scorecard Objectives

Departmental objectives are aspirational and measurable statements that translate how your major activities support the goals and objectives of the Strategic Plan. They should be written in a way that can be easily understood and relatable to departmental operational staff. The following examples provide clear, aspirational, and measurable statements of objectives:

- Reduce Fire Rescue Dispatch Time (aligned to Strategic Plan Objective PS2-1 Minimize Response Time)
- Increase Positive Outcomes for Pets (aligned to NI1-5 Ensure Animal Health and Welfare)
- Manage the Effective Use of Housing Choice Vouchers (aligned to HS2-1 Provide the Necessary Support Services for Vulnerable Residents and Special Populations)

To develop departmental objectives, department staff should take the following steps:

- 1. Identify the goals and associated objectives from the County's Strategic Plan that the department most directly supports.
- 2. Evaluate departmental operations and key objectives, and identify those programs, activities, or any associated initiatives that support the achievement of the County Strategic Plan objectives.
- 3. Validate the departmental objectives on your scorecard. Check to see if they are linked to the correct strategic plan goal or objective. Please contact OMB if the objectives on your departmental scorecard need to change (added or removed) or if you believe the linkages to the Miami-Dade County Strategic Plan are incorrect, or new linkages need to be made.
- 4. Organize your objectives using common balanced scorecard perspectives:
 - a. Customer: objectives related to residents and your customers
 - b. Financial: objectives related to your budget and key revenue and cost drivers
 - c. Internal: objectives related to processes that impact (a) and (b) above
 - d. Learning and Growth: objectives related to your employees, their professional development and skill levels





Departmental Objectives should be linked to the correct "Parent Objective" in the Strategic Plan.

2. Performance Measures and Targets

Performance measures must be established to assess how well departments are meeting their objectives as well as the goals and objectives included in the County Strategic Plan. Performance measures must also include *targets* that support achievement of the Strategic Plan.

Performance measures should focus the desired outcome as expressed by the objective or for an activity's efficiency. Input and output measures are of secondary importance. As a best practice, all performance measures in the SMS must contain a clear and brief description of how the measure is calculated, what the measure is measuring, and on the source of the information used to calculate the performance measure.

The <u>Miami-Dade County Performance Measure Standards</u> provide standards for developing scorecard measures.



- Please make sure your scorecard objectives display the correct measures.
 - The measures should have targets set and locked in the SMS through FY 2025-26. Please verify that annualized targets are correct.

3. <u>Scorecard Initiatives</u>

- Reassess all your current initiatives, including your Priority Initiatives identified during your planning process and listed in your business plan. **Priority Initiatives should be tracked in SMS and shown on your department scorecard**.
- You can remove initiatives from the SMS that are complete. Contact OMB for guidelines on archiving these completed initiatives.
- Make sure measure and initiative owners are up-to-date.

Finalizing the Business Plan Report

• When all the above changes have been completed on your scorecard, run the Business Plan Report in the County's SMS. Save the document as a PDF and email it along with the signed business plan narrative to OMB. Please call OMB if you have any difficulty finalizing this report.

• The <u>Instructions for Printing the Business Plan Report</u> contain step-by-step instructions.